

Instructions and Helpful Hints for using the CPF Plan Template (The template only works with Microsoft Word 97 or Word 2000)

Transferring the template to a computer:

1. Right-click the link for CPF Template. A menu will appear
2. Choose Save Link As from the menu.
3. Save it to a known location, such as a floppy disk (A:) (If saved to a location other than A:, substitute that location in the instructions below for A:)
4. Place the disk provided in drive A:
5. Double-Click on My Computer (Icon on desktop)
6. Double-Click on A:
7. Select *2004 CPF Template.dot* (Click once).
8. Right click (a menu will appear)
9. Choose Copy
10. Close all windows opened so far in this procedure.
11. Open Word
12. From the Tools menu Choose Options.
13. Click on the File Locations Tab
14. Highlight "User Templates" (Click once)
15. Click on the Modify button (a new window will appear)
16. In the white area where files and folders are listed, right click once (a menu will appear)
17. Choose Paste (The window may flash, otherwise nothing will happen)
18. Press Ok. (The window will disappear)
19. Press Ok. (The Options menu will disappear)

Creating a CPF Plan using the Template:

1. Open Word
2. Choose New from the File menu (a new window will appear)
3. Choose the General Tab
4. Choose *2004 CPF Template.dot* (click once)
5. Press Ok. (A new document will open and a window will appear)

- ❖ The document is set up to automatically calculate totals. This can cause a short delay when moving the cursor.
- ❖ Pressing F1 displays help on most of the fields. If there is no help for a particular field, nothing will happen when you press F1.
- ❖ Bus Replacement Rates (page 1) are disabled prior to 2001 because the fund was not a separate fund until 2001.
- ❖ Once created this document can be saved and reopened like any other document.
- ❖ Press the General Info toolbar button to add the school name, number, and county to the header of the document.
- ❖ The occupancy date should be entered in MM/DD/YYYY format. If month and day are unknown, use 01/01/YYYY
- ❖ The template consists of space for a single facility. Use the toolbar to ADD more facilities.

Questions regarding the template can be emailed to bdudley@tcb.state.in.us or directed to Brenda Dudley at 317-233-2709.